St. Paul's Carroll Street
Digital Stewardship

Online Giving using Realm - Quick Start

St. Paul's Episcopal Church   1

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The Goal

Enable Parishioners to **give 'electronically'**

- **What this means**, basically:
    - No checks or cash needed at Church
    - Funds are transferred from any bank account into a St. Paul's bank account.

- **How it works**, basically:
    - Parishioners use REALM to set up a donation.
    - St. Paul's receives the funds in its account.

- **The immediate benefits**:
    - **Reduce** the number of paper checks and manual processing.
    - **Reduce** fees incurred by current electronic methods (PayPal)

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How it works - overview

1. Parishioners are invited to activate their profile in **Realm**
2. Parishioners log in to the St. Paul's Realm system
3. Select "Giving"
4. Configure Funds Transfer details

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The base technology - ACS Realm

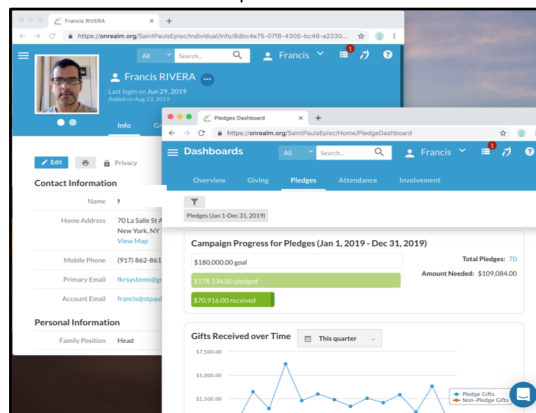St. Paul's uses **Realm** by ACS Technologies.
- We use the ACS church accounting software.
- Leader in the field

Realm is used for Parish Management:
- Address/Contact information
- Track donations/pledges
- Managing groups and communities

**Activating the Realm account is
required for electronic giving.**

Screenshots of the REALM platform

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Step-by-Step Setup Overview

1. Parishioners **receive an email invitation** with the subject 'join our online community' from a St. Pauls email address

2. **Activate** your account on Realm (Create password)

3. **Verify** your account on Realm

4. Sign In to Realm

5. Review profile on Realm and **click "Giving"**

6. Use "Give" to **configure giving** options

FOLLOWING PAGES HAVE GUIDES FOR THESE STEPS

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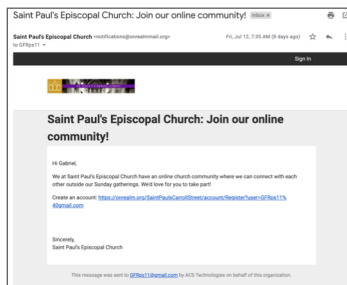

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1. Email invitation to join St. Pauls/Realm
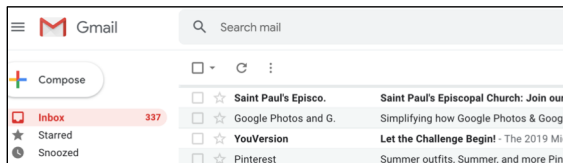
Email will come from Saint Paul's Episcopal Church <notifications@onrealmmail.org>

Click the link in the email to be taken to the "Register" page (**see next page, step 2**)

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2. Activate your account on Realm

Register

Sign-up is easy, and it's free! Get started by completing the fields below.

Email Address
someone@someplace.com

Create Password (8 character min)

Confirm Password

Your password must have:
- At least 8 characters
- A mix of uppercase/lowercase letters, numbers and symbols

For your security, avoid:
- Repeating characters
- Sequences (abc, cba, 123, or 321)
- Any part of your email address
Why?

I'm not a robot — reCAPTCHA Privacy - Terms

By clicking the register button below, you agree to the Software Services Agreement and you are 13 years of age or older.

Register

Please check your email.
We are sending you instructions to activate your account.

Create password and Click "Register"
You will see a "Check your email" message
Proceed to Step 3

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3. Verify your account on Realm

int Paul's Episco.   Saint Paul's Episcopal Church: Email Verification - Sign In Saint Paul'
int Paul's Episco.   Saint Paul's Episcopal Church: Join our online community! - Saint Pau

Saint Paul's Episcopal Church: Email Verification

Hi,
Thank you for joining our online church community!
Before you can sign in, please verify your email to complete your registration.
Verify your email: https://onrealm.org/SaintPaulsCarrollStreet/account/Validate?user=friverajobapps%40c
Screenshot 3.1: Email verification and link

Sign In — https://onrealm.org/SaintPaulsEpisc/SignIn?ReturnUri=%2FSaintPaul...

Please Verify Your Birthday

For your protection, we ask users to validate their birth date against our records. Once we have verified you, we will send you a confirmation email.

Birthday *
Month   Day

Verify Me

Screenshot 3.2: Birthday verification screen

After creating password in Step 2, you will receive another email with a link

Click the "Verify your email" link in the email.
(see screenshot 3.1, at left)

After clicking the link in your email you will be taken to the website to verify your birthday.
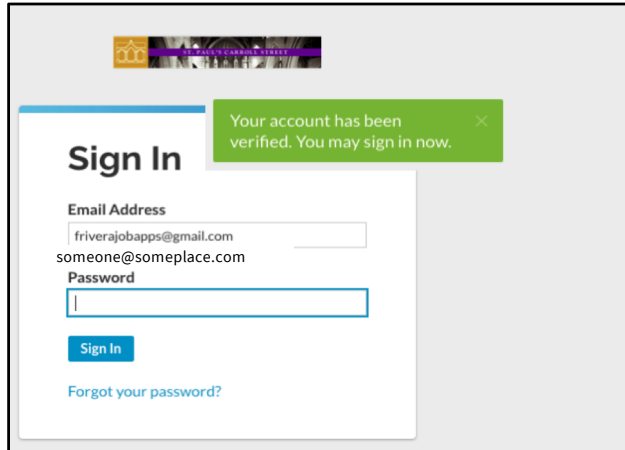*(see screenshot 3.2 below)*

If this fails, send an email to info@stpaulscarrollst.org
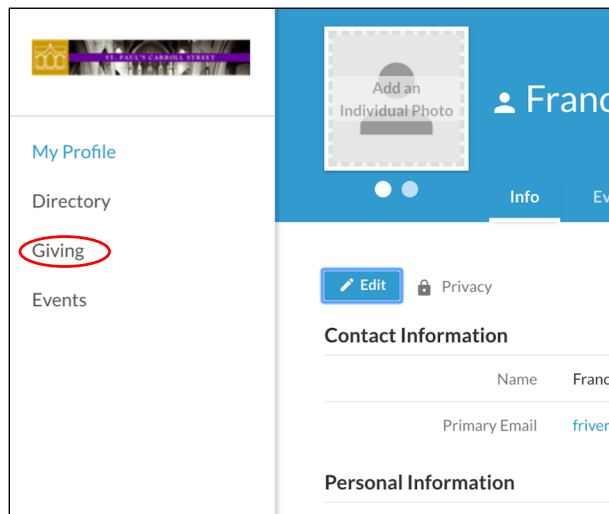
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4. Sign In to Realm

After clicking the "Verify Me" button, you will log into the system using your email address and password

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5. Review profile on Realm and <u>click "Giving"</u>

You can update any part of your profile here:
- Address
- Phone
- Family members
- Etc.

Be sure to click **GIVING**

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6. Use "+Give" to configure AND change gift details

Giving

+ Give | Pledge | Giving | Scheduled
Reset Filters | Year to date

Giving >
Give Now

GIVING DETAILS

Give * [0.00] to [Pledges]
Frequency * [One time ▾]
On * [09/22/2019 📅]

PAYMENT INFORMATION

☑ Save for future use
Account Nickname [ ]
Account Type [Credit/Debit Card]
Account Number * [ ]

On the **GIVING** screen
Click +Give to set up a new contribution
Configure Giving Details (amount, schedule)
Select which FUND (usually "Pledges")
Enter Payment Information (source)

At any time you may log on to the system and make changes to your giving configuration, such as amount, frequency, source, etc.

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Behind the scenes - what's the cost?

The service is provided by a combination of products and vendors:

Vanco
- Charges an EFT Processing fee
- 0.9%

ACH (Automated Clearing House)*
- Interbank system for transfers
- *.35 per transaction/transfer

Realm
- _No_ additional fee over our current monthly subscription

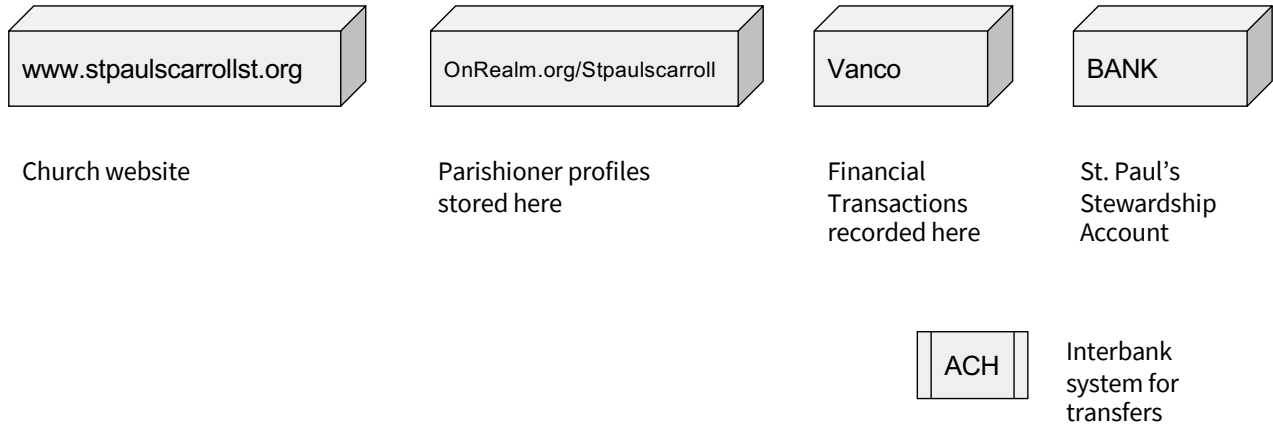*NOTE: PayPal service charges 4% per transaction and does not provide additional services.*

Sample Individual Contribution	
Contribution	$125.00
ACH Fee	$0.35
Vanco (0.9%)	$1.13
Net	$123.53

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Behind the scenes - The pieces of the system

www.stpaulscarrollst.org	OnRealm.org/Stpaulscarroll	Vanco	BANK
Church website	Parishioner profiles stored here	Financial Transactions recorded here	St. Paul's Stewardship Account

ACH — Interbank system for transfers

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Behind the scenes - Security

www.stpaulscarrollst.org	OnRealm.org/Stpaulscarroll	Vanco	Bank

Church website
No personal data here

Church Management Software
Profile Data maintained here

Disclosure on Security Practices:
- Redundant Internet Capabilities
- Enterprise Servers & Management
- Amazon Web Services ("AWS")
  - PCI DSS Level 1 compliant as a Service Provider
  - SAS70 Type II certification.
- Data Backup and Recovery
- Web-based Services
- Encrypted backup data and synchronize this data to our offsite disaster recovery location.
- Firewall
- SSAE Certification
- PCI Compliance
- Independent Auditors for Security
- Facility Security
- Power Backup
- Disaster Recovery Plan

https://legal.acst.com/data-security-measures

Transaction Platform

Disclosure on Security Practices:
- Level 1 PCI 3.2 Service Provider
- Payment Card Industry Data Security Standard (PCI DSS)
- Set of security requirements for protecting cardholder data.

St. Paul's Stewardship Account

ACH — Interbank system for transfers

RSI	
Organization:	Vanco Payment Solutions
Certification:	RSI PCI DSS Certified
Valid Until:	Jan 6, 2020
Link:	http://vancopayments.com/

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Tips, F.A.Q.s, Things to Keep in Mind

If you have a Pledge number you will receive an invite (Date TBD)
      - You can request an invite sooner

If you would like to receive and invitation to join Realm and get a pledge number send an email with your name, postal address and phone number to stewardship@stpaulscarrollst.org

Each member of the Parish can have a Realm profile. Some profiles will belong to families. The HEAD of that family (in Realm) can edit those profiles.

Each individual can manage their directory information, online giving, notification preferences and privacy settings directly online

Whom do I ask if I have a question about Realm?
Please email stewardship@stpaulscarrollst.org

Is my financial information private?
The parish staff account and treasurer can see pledges and contribution history. No financial account information is captured or visible within Realm.

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Thank You

Have Questions?

stewardship@stpaulscarrollst.org

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